

Reforming legacy rules, building a digital EU

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ECTA Conference 2014

Brussels, 20 Nov. 2014

THINK DIGITAL – REFORM – PROSPER



Market trends: why the 90s are... gone!



- Network operators' revenues are restructuring: access revenues take over service revenues, and OTTs are changing market dynamics
- Cable was local & small, now it's bigger & stronger
- Industry reconfiguration to meet demand of bundled services by consumers (fix, mobile, ...)
- Mobile markets maturity is higher
- Demand for data is strong, with increasing importance of content & video

We need Reform

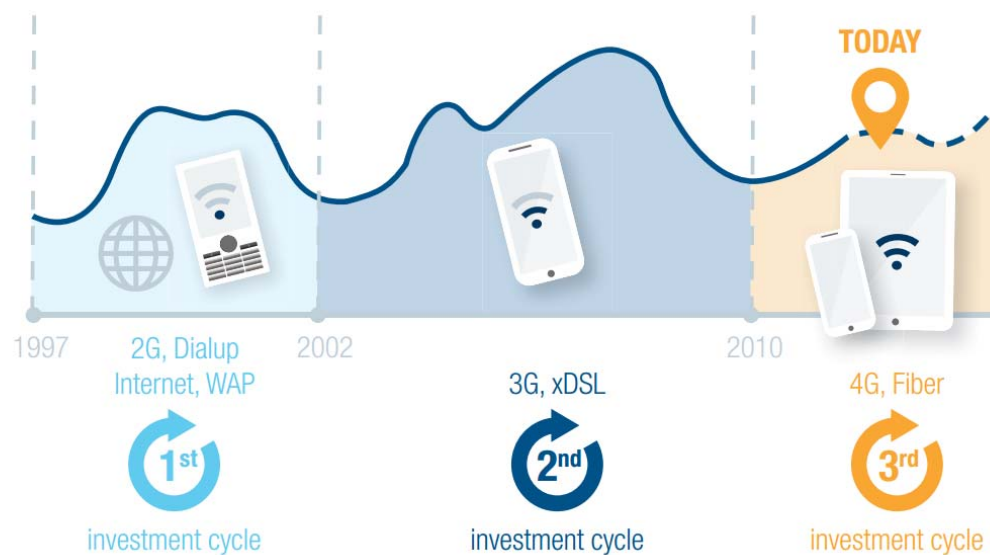




Where do we go next?

- Objective: promotion of innovation & investments in infrastructures & services
- Positive externalities on citizens, economy & society at large

Investment Cycles in the Telecom Industry



Source: AD Little, see www.etno.eu/etno-agenda-for-europe



How to get there: ETNO's view



- Speeding up **fibre-to-copper transition**:
Let's drastically simplify access regulation
- Achieving **stronger & more efficient** operators:
Let's allow greater rewards for investments and appropriate consolidation of the wireless market
- Better **reflecting the new competitive environment**:
 - *Ensure role of cable operators is taken into account when assessing markets & SMP*
 - *Think-OTTs when looking at the value chain: promote less regulation for all & ensure level-playing field*
- Getting a real **Telecoms Single Market**:
Let's fix spectrum.



Beyond regulation: a vision to connect the dots



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